

Job Aid: Schedule an Offering

Tasks

- A. Add a Scheduled Offering
- B. Complete the Custom Fields Tab
- C. Set Registration Parameters
- D. Complete the Segments Tab (includes Resources)
- E. Copy Resources

Task A: Add a Curriculum/Summary Tab

1. Click **Scheduling > Scheduled Offerings**.

The screenshot shows the SATERN system interface. At the top, there's a navigation bar with links: Administration | Home | Preferences | Help | Logout. Below that, a secondary navigation bar lists: Learner Management | **Scheduling** | Learning | Commerce | Resources | References | Reports | Tools | System Admin. The main content area is titled 'Scheduled Offerings' and includes a search bar with a 'Search' button and a 'Results' tab. Below the search bar, there's a section for 'Search Scheduled Offerings' with instructions on how to use the search functionality. On the left side of the main content area, there's a sidebar with a 'Scheduled Offerings' section containing links: Close Scheduled Offering, Cancel Scheduled Offering, Group Instances, Classes, and Curriculum Scheduling.

2. Click the **Add New** link

| [Simple Search](#) | [Advanced Search](#) | [Add New](#) | [Help](#) |

3. Select **Item**.
*Activities are 'non-learning' schedule blocks. Use this option if reserving resources for a period of time.

The screenshot shows the 'Add New' page in the SATERN system. At the top, there's a navigation bar with links: Simple Search | Advanced Search | [Add New](#) | Help |. Below that, there's a section titled 'Select Scheduled Offering Type' with two radio buttons: ☒ Item and ☐ Activity. At the bottom right, there's a 'Next' button.

4. Click the **Next** button.

[Next](#)

5. Enter/select all required information.

- ◆ Item Type
- ◆ Item ID
- ◆ Segment Start Date
- ◆ Segment Start Time
- ◆ Time Zone (Show in this Time Zone checkbox is optional)
- ◆ Domain
- ◆ Facility
- ◆ Contact Information (Email, Phone)

6. Click the **Add** button.

[Add](#)

Task A: Add a Curriculum/Summary Tab (continued)

7. Note the system generate Scheduled Offering ID.

Scheduled Offering ID: 24
Item: COURSE **ARC-SAFETY** (Rev 10/6/2005 10:06 AM EST)
Title: ARC Site Safety Basics

8. The entered information displays on the **Summary** tab.

Scheduled Offering ID: 24
Item: COURSE **ARC-SAFETY** (Rev 10/6/2005 10:06 AM EST)
Title: ARC Site Safety Basics

[Standard Options](#)

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	Registration	Contacts	Materials	Custom Fields

Edit the Scheduled Offering

* = Required Fields

Apply Changes Reset Copy Scheduled Offering... Delete

Group Instance:

* Domain:

Facility:

* Time Zone: ☐ Show in this Time Zone

Approval Process ID:

Approval Required: ☐

Contact:

Email:

Phone:

Fax:

Active: ☒

Auto Fill Registration: ☐

Comments:

Closed: No [Close the Scheduled Offering](#)

Closed Date:

Cancelled: No [Cancel the Scheduled Offering](#)

Cancelled Date:

9. If edits to data are made on the **Summary** tab, click **Apply Changes** before leaving the screen to save the changes.

Apply Changes

Task B: View the Custom Fields Tab

- Click the **Custom Fields** tab.

[Standard Options](#)

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	Registration	Contacts	Materials	Custom Fields

Edit the Custom Fields for the Scheduled Offering

- Custom Fields** are automatically imported from the Item when a Scheduled Offering is created. If changes are necessary, the values are editable.


Column	Label		Value	Description
1	On Duty Hours		16.0	
2	Off Duty Hours			
3	Purpose of Training		03	Improve Present Performance
4	Type of Training		01	Training Program Area
5	Type of Training Sub-Code		08	Information Technology
6	Source of Training		03	Non-government
7	Special Interest Code		0A	No Special Program
8	Academic Credit Code		05	N/A
9	Training Credit Type Code		03	Continuing Education Unit
10	Direct Cost Code		C	Contract - Funded by Center
11	Per Participant Cost		250.00	
12	Books & Materials Cost			
13	Other Direct Cost			
14	Indirect Cost Code		0	No Indirect Cost
15	Travel			
16	Per Diem			
17	PO Number		NNJ05JD43P	
18	Category Code		B	
19	Sub Category Code		A	
20	Funding Organization		AH3	
21	POC		Brett Jones	
22	Budget Line Item			

- If you made changes, click the **Apply Changes** button.

Apply Changes

Task C: Set Registration Parameters

1. Click the **Registration** tab.

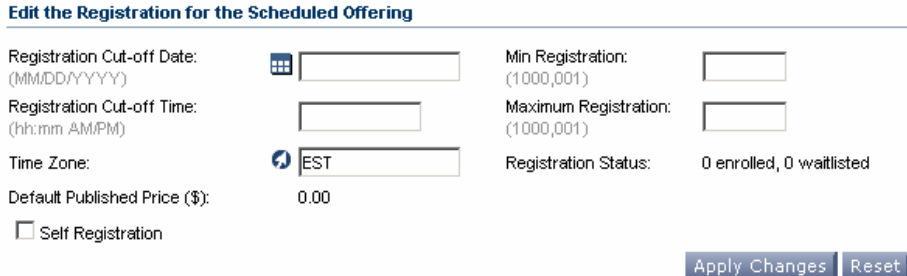


The screenshot shows a top navigation bar with several tabs: Notifications, Cost Calculation, Cost Summary, Pricing, Catalog, Chargeback, Summary, Segments, **Registration** (highlighted), Contacts, Materials, and Custom Fields. Below the tabs is a link labeled 'Edit the Scheduled Offering'.

2. Enter the **Min Registration** and **Maximum Registration** fields.

Note: If Learners are allowed to self-register for this offering, check the **Self Registration** checkbox. I

If self registration is enabled, you can set a **Registration Cut-off Date** and **Registration Cut-off Time**. Learner will be unable to self-register or self-withdraw after this date/time.



The screenshot shows the 'Edit the Registration for the Scheduled Offering' form. It contains the following fields and controls:

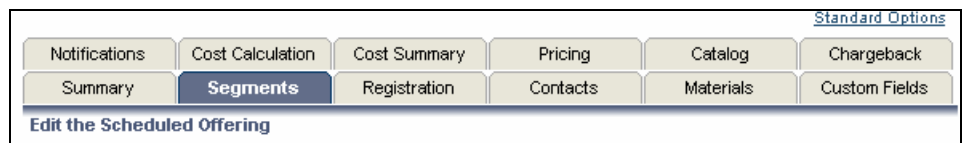
- Registration Cut-off Date: (MM/DD/YYYY) [Calendar icon] [Text box]
- Registration Cut-off Time: (hh:mm AM/PM) [Text box]
- Time Zone: [Clock icon] [Dropdown menu showing EST]
- Default Published Price (\$): 0.00
- ☐ Self Registration
- Min Registration: (1000,001) [Text box]
- Maximum Registration: (1000,001) [Text box]
- Registration Status: 0 enrolled, 0 waitlisted
- Buttons: Apply Changes, Reset

3. Click the **Apply Changes** button.

Apply Changes

Task D: Complete the Segments Tab

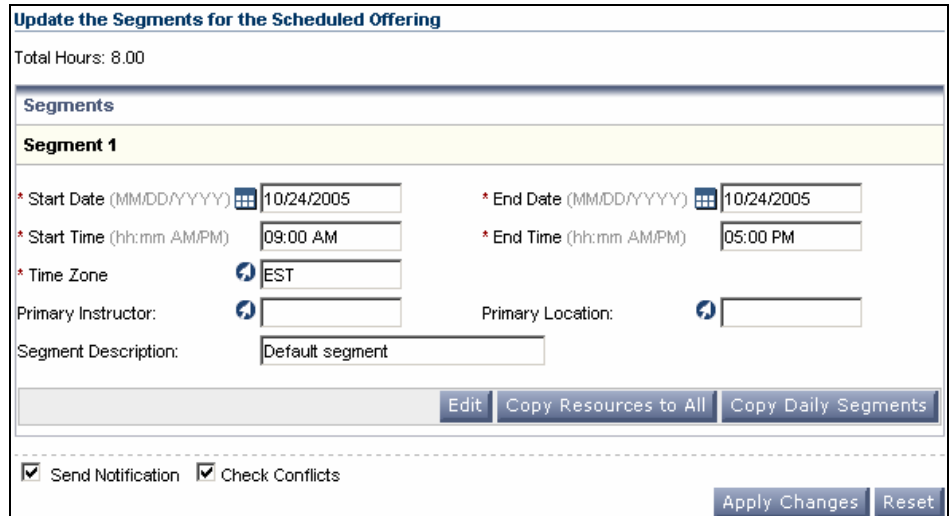
1. Click the **Segments** tab.



The screenshot shows the top navigation bar of the SATERN Administrator interface. The 'Segments' tab is highlighted in blue. Other tabs include Notifications, Cost Calculation, Cost Summary, Pricing, Catalog, Chargeback, Summary, Registration, Contacts, Materials, and Custom Fields. Below the tabs is a link labeled 'Edit the Scheduled Offering'.

2. **Scroll down** to view the “Update the Segments...” section, the defaults from the Item’s Delivery Data tab along with the entered start segment date/time entered for the Scheduled Offering are used to create the actual schedule for the Scheduled Offering.

If necessary make changes to the date/time information.




The screenshot shows the 'Update the Segments for the Scheduled Offering' form. At the top, it says 'Total Hours: 8.00'. Below this is a section titled 'Segments' with a sub-section 'Segment 1'. The form contains several input fields: 'Start Date (MM/DD/YYYY)' with a calendar icon and the value '10/24/2005', 'End Date (MM/DD/YYYY)' with a calendar icon and the value '10/24/2005', 'Start Time (hh:mm AM/PM)' with the value '09:00 AM', 'End Time (hh:mm AM/PM)' with the value '05:00 PM', 'Time Zone' with a dropdown menu showing 'EST', 'Primary Instructor' with a dropdown menu, and 'Primary Location' with a dropdown menu. There is also a 'Segment Description' field with the value 'Default segment'. At the bottom of the form are three buttons: 'Edit', 'Copy Resources to All', and 'Copy Daily Segments'. Below the form are two checkboxes: 'Send Notification' and 'Check Conflicts', both of which are checked. At the bottom right are two buttons: 'Apply Changes' and 'Reset'.

3. Click the **Apply Changes** button.

Apply Changes


Task D: Complete the Segments Tab (continued)

4. Enter a Primary Instructor for the Segment.

Note: If you do not know the ID, click  to access the Instructors search screen.

The search screen defaults with pre-populated Item information.

This causes SATERN to search for Instructors that have been “Authorized” to teach the Item. The Item information can be removed from the search criteria to locate all Instructors.

Primary Instructor:  JMALONE

Instructors | [Simple Search](#) | [Advanced Search](#) |

Search

Search Results

Search Instructors

Enter the ID or Description, select the type of search from the drop-down menu, and click "Search" to browse results. Enter an exact ID and select "Exact" from the drop-down menu to go directly to a record. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Please note that a case insensitive search could take a long time.

Case sensitive search: ☒ Yes ☐ No

Instructor ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With


Items: [Filter by criteria](#) or by Type: ID:

Status: ☒ Active ☐ Not Active ☐ Both

Instructors: ☐ Available for current segment ☐ Available for entire scheduled offering ☒ All

Task D: Complete the Segments Tab (continued)

5. Enter a Primary Location for the Segment.

Note: If you do not know the ID, click  to access the Location search screen.

If a Location Type was entered on the Item's Delivery Data tab, the search screen defaults with pre-populated Location Type.

This causes SATERN to search for Locations that have been setup as that type. The Location Type can be removed from the search criteria to locate all Locations.

Primary Location: 

Locations [Simple Search](#) [Advanced Search](#) [Help](#)

Search

Search Results

Search Locations

Enter the ID or Description, select the type of search from the drop-down menu, and click "Search" to browse results. Enter an exact ID and select "Exact" from the drop-down menu to go directly to a record. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Please note that a case insensitive search could take a long time.

Case sensitive search: ☒ Yes ☐ No

Location ID: Starts With

Description: Starts With

Location Type: [Select from list](#) or By ID Starts With

Locations: ☐ Available for current segment ☐ Available for entire scheduled offering ☒ All

Search **Reset**


6. Click the **Apply Changes** button.

Note: If the Scheduled Offering has multiple Segments, SATERN displays two pop-up warning boxes indicating that no Primary Instructors and Locations specified.

Click **OK** when these messages display.


Apply Changes

Microsoft Internet Explorer

 No primary Instructor specified. Do you wish to proceed?

OK **Cancel**

Microsoft Internet Explorer

 No primary Location specified. Do you wish to proceed?

OK **Cancel**

Task E: Copy Resources

If a Scheduled Offering has multiple Segments, resources, once applied to the first Segment, can easily be copied to all remaining Segments.

- On the Scheduled Offering **Segment** tab, locate the Segment that has a Primary Instructor and Location applied.

Update the Segments for the Scheduled Offering

Total Hours: 16:00

Segments

Segment 1

* Start Date (MM/DD/YYYY) * End Date (MM/DD/YYYY)

* Start Time (hh:mm AM/PM) * End Time (hh:mm AM/PM)

* Time Zone

Primary Instructor: Primary Location:

Segment Description:

[Edit](#) [Copy Resources to All](#) [Copy Daily Segments](#) [Delete](#)

- Click the **Copy Resources to All** button.

[Copy Resources to All](#)

- Check the box next to the Resources to copy to all Segments.

Note: Leave the **Check Conflicts** box checked to have SATERN verify that the selected Resources are not already booked for use during the Segment timeframes.

Scheduled Offering ID: 24

Item: COURSE **ARC-SAFETY** (Rev 10/6/2005 10:06 AM EST)

Segment: 1 (Default segment)

Start Date/Time: 10/24/2005 09:00 AM EST

End Date/Time: 10/24/2005 05:00 PM EST

[Return to Scheduled Offering](#)

Choose Resources for Copy

☐ Copy All

☒ Copy Instructor

☒ Copy Location

☐ Copy Equipment

☐ Copy Material

☐ Copy Custom Resource

Check Conflicts: ☒ [Copy](#) [Reset](#)

- Click the **Copy** button.

[Copy](#)

Note: If conflicts are detected, SATERN displays the conflicting timeframes.